



In the mood

Opportunities in functional foods supporting mood, relaxation and overall mental well-being

Americans are more stressed than ever, and many believe that tension is having a negative impact on their health.¹ But there's good news: When it comes to stress and mental health, diet matters.

Many Americans are keying into this as they realize that a number of foods (or the compounds/nutrients in them) can have a positive impact on our brains, our mental health and, in turn, our overall well-being – from the omega-3s in fatty fish to the caffeine, N-acylethanolamine and theobromine in dark chocolate.

So in today's world of functional foods designed to address specific consumer needs, it's no surprise that these mood-boosting ingredients are finding their way into products that claim to support mood, reduce fatigue and enhance sleep.

These ideas aren't especially new. Stress has been a growing concern for nearly two decades, and the concept that products could be formulated to address stress and its effects was already ramping up in 2019 when Innova Market Insights found that more than 40% of consumers were extremely or very interested in products with mood-related benefits.² Then in 2020, the theory went into hyper-drive as consumers reported heightened anxiety, loneliness and fears prompted by the COVID-19 pandemic.

The rise of mood foods is really at the center of several key shifts in consumer attitudes and bolstered by the

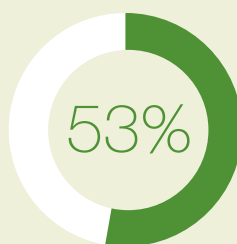
pandemic. For example, consumers have become more attuned to the need for a strong immune system, while noting a desire to maintain physically and mentally fit to develop resilience to the effects of stress and fatigue.³ This has also prompted growing interest in “food as medicine,” with products that offer positive nutrition (as opposed to a more reductionist approach to diet control) and those that are personalized or aimed at supporting specific health goals.

The mood food consumer

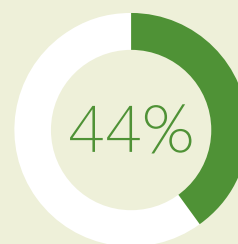
For many adults, food is now a way to manage a health condition, according to data from the NPD Group, with one in five now saying they try to manage their health with food and beverage choices.⁴ What's more, about 7 in 10 believe it is important to choose foods and beverages that positively boost nutrition and target bodily function.⁵

It's interesting to note that as consumers prioritize holistic well-being, mental health is more important than ever.⁶ Innova Market Insights data shows that growing numbers of consumers are taking action to improve their health through mental and emotional caretaking.

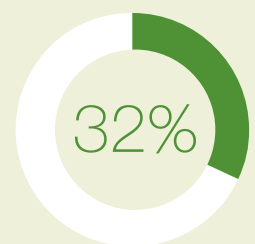
Share of global consumers saying that they have taken action to improve their health and well-being, by wellness type:



Physical well-being



Mental and emotional well-being



Spiritual time

Source: Innova Market Insights. Top Ten Trends 2021.

While these ideas are increasingly appealing across generations, demographic groups exhibit subtle differences and tend to prioritize their efforts differently. For example, millennials are the most likely age group to seek balance between physical and mental health; they also seek products that support ethical consumption and allow for a bit of indulgence, according to analysis from Innova Market Insights. More than 50% report they are focusing more on their happiness.⁷

Gen X expresses a particularly strong focus on mental health, and they typically prioritize family and social time with friends. Baby boomers are focused on healthy aging and everything that comes with that, including energy/alertness, immune health, joint support, as well as maintaining healthy bones and brain.⁸

But perhaps most interestingly, the concept of holistic health and mental wellness may be surging most among the youngest adults, Generation Z. Recent data suggests that more than 9 in 10 reported physical or psychological problems from stress; 72% say they view healthy eating as integral to physical and mental health, and 60% believe that the pandemic's single most important societal effect will be the rise of individuals taking responsibility for their own health.⁹ While they mirror millennials in their holistic health interest and integration into daily regimens, Gen Z are digital natives, so they may also change the game further as they seek to thoroughly vet the brands they choose to support their goals.

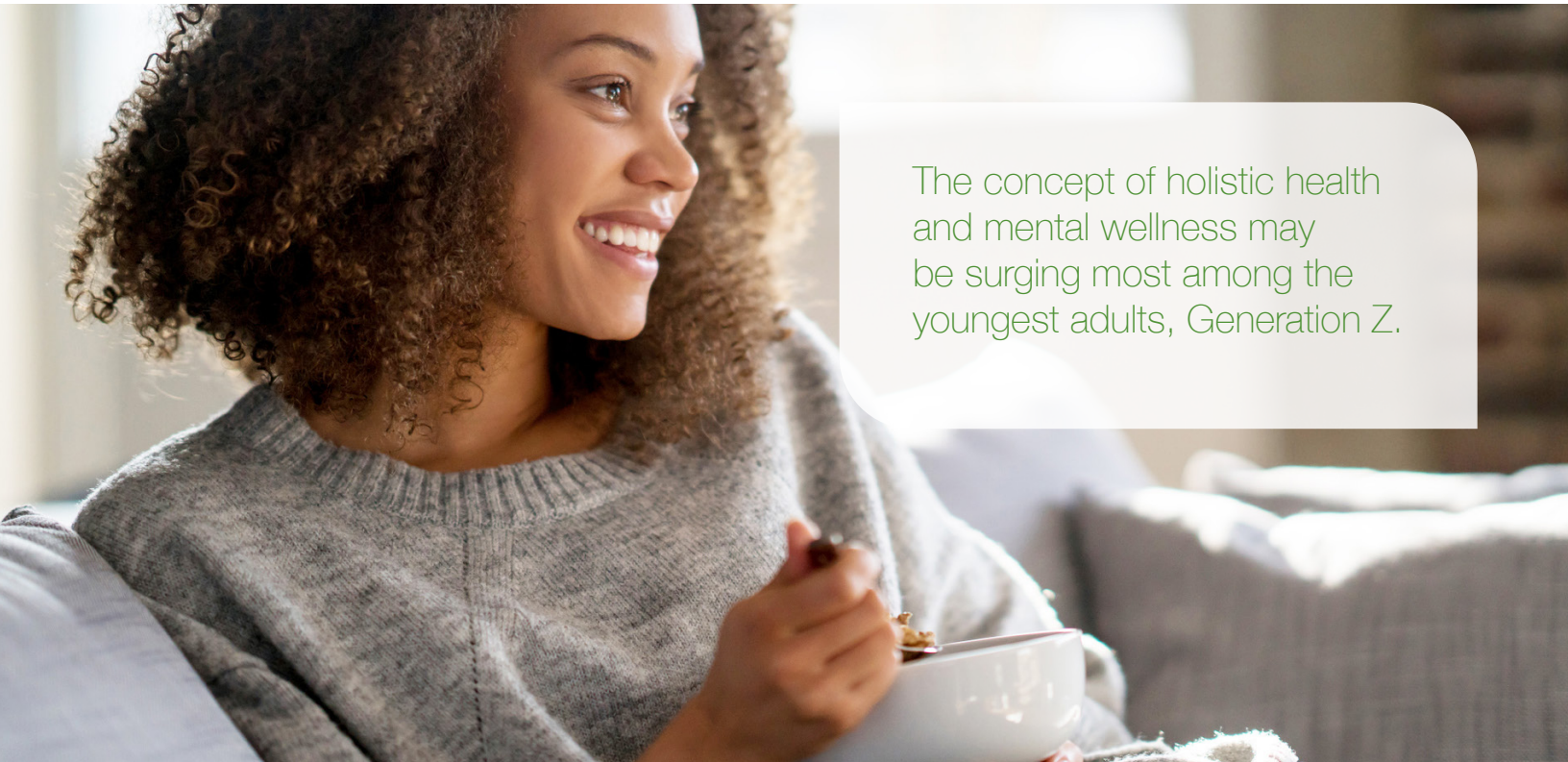
More is better

All this is having an impact on new product development. The food and beverage industry has stepped up to the plate with a variety of products targeting mood-based worries, including anxiety, stress and sleep deprivation.¹⁰ But innovation in this space is expected to increase as consumers get more savvy about how specific ingredients function and more discerning about ingredients that meet overall health benchmarks like reduced sugar and plant-based proteins.

The good news is that there is a growing body of evidence supporting the function of many compounds as well as new GRAS (Generally Recognized as Safe) ingredient solutions that can support mood-based platforms. Brain health is one of the key categories, with products boasting these claims rising sharply since 2019, according to Innova data, which also noted that products with brain health claims made up 1.5% of new foods and beverages in the U.S. in 2020.¹¹

Functional beverages, such as sports and energy drinks and protein beverages, have been especially popular in the mood category, as they work well for bioactive compounds. Many of these compounds also have good data supporting their efficacy.

Not surprisingly, products that tout relaxation and restful sleep are also a burgeoning sub-segment of the mood food and drink category.

A young woman with curly hair, smiling and eating from a bowl. The image is a close-up, showing her from the chest up. She is wearing a grey sweater and is holding a white bowl with a spoon. The background is blurred, suggesting an indoor setting.

The concept of holistic health and mental wellness may be surging most among the youngest adults, Generation Z.

Vitamins, minerals and various herbal ingredients often take center stage in these products, with ingredients like chamomile, turmeric and magnesium having positive consumer perception and potential benefits. These products are surfacing in wellness drinks ranging from milks to teas, as well as a variety of snacks touting focus, energy and relaxation.¹²

The next frontier in mood-based foods is likely among those products that forge the link between gut health and overall well-being, as evidence paints a strong picture that the health of the microbiome is integral to brain function, relaxation and even good sleep.¹³ Consumers are already well aware of gut-supporting ingredients like probiotics, prebiotic fibers and sleep-supporting vitamins like B6 and magnesium.¹⁴ Innova data reports that gut-friendly ingredients are surfacing in products claiming both digestive support and better sleep.¹⁵

Given that our busy, stressed-out lifestyles are unlikely to go away overnight, the future for these products looks promising, especially as dual claims for gut health and better sleep gain traction. Innova analysts suggest that new opportunities in the space will likely focus on products with multiple claims around gut health, immunity and mood.

Cargill can help you target holistic well-being with feel-good foods. Learn more at cargill.com/labelfriendly.

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